



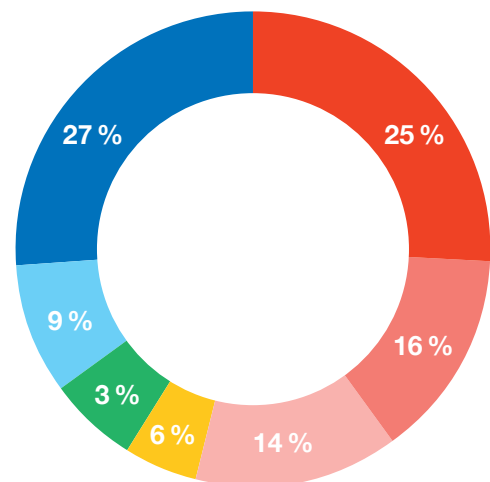
Biotechnology Industry in Germany 2020

Area of Focus

The majority (55 %) of the 668 German biotech SMEs are active in the medical sector. 25 % of these companies develop new drugs e. g. for cancer immunotherapies, autoimmune or neurological diseases. 16 % develop diagnostics, e. g. tests for cancer or rapid pathogen detection. Another 14 % offer services for medical research.

These medical biotech companies contribute considerably to the gross value added of the German health care sector. About one tenth (9 %) of German biotechs are active in industrial biotechnology and develop e. g. biofuels, enzymes, dietary supplements or specialty chemicals.

About 6 % of the enterprises deal with Big Data and Bio-IT and constitute the bioinformatics sector. The number of SMEs devoted to agrobiotechnology is declining. A mere 3 % are active in this field. One quarter of German biotech companies offer non-specific services (27 %).



- Med. Biotechnology / Therapeutics
- Med. Biotechnology / Diagnostics
- Med. Biotechnology / Services
- Bioinformatics
- Agrobiotechnology
- Industrial Biotechnology
- Non-specific services

Source: BIO Deutschland



Company Directory

Free access to more than 3,500 profiles of companies active in the German healthcare market!

<https://www.exportinitiative-gesundheitswirtschaft.de/company-directory>

Free Access!

Guide to German Biotech Companies



VENTURE VALUATION
GLOBAL VALUATION SERVICES



Dedicated Biotechs in Numbers

As the figures show, Germany's biotech sector continues to grow. Significant increases were seen in revenue and in the number of companies and employees. The number of people employed in the sector rose by 16 % to nearly 34,000 over the past year while

the number of biotech companies (668) only slightly increased in the same period. Revenue generated in 2019 was up 10 % year on year at 4.87 billion euros. Especially publicly traded companies invested significantly in research and development (58 %).

	Private Companies			Public Companies			Total Industries		
	2018*	2019	%	2018*	2019	%	2018*	2019	%
General key data									
Number of companies	628	645	+3	21	23	+10	649	668	+3
Number of employees**	19,659	21,944	+12	9,332	11,762	+26	28,991	33,706	+16
Financial data (€m)									
Turnover	2,534	2,619	+3	1,908	2,251	+18	4,442	4,870	+10
R&D expenses	963	973	+1	517	819	+58	1,480	1,792	+21

* Deviations from previous year's figures are due to the subsequently corrected full-year figures for listed companies as well as to subsequently identified start-ups that were not available at the time of going to press or had not yet been entered in the commercial registers.

** For private companies in Germany, for public companies worldwide.

Source: EY (public companies), BIO Deutschland (private companies)

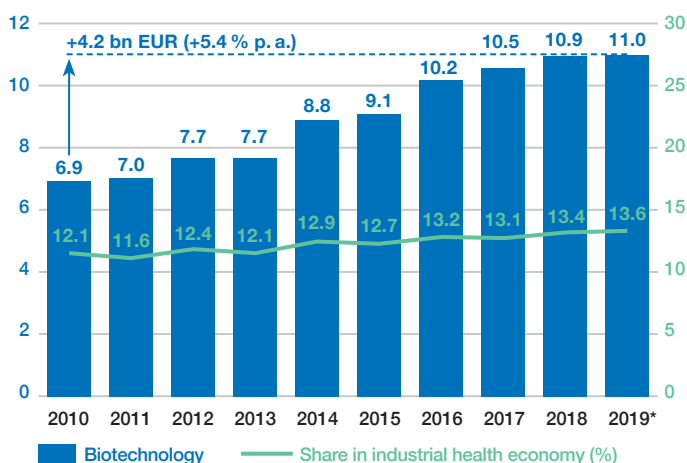
National Account

In 2019, the estimated total gross added value in the sector of medical biotechnology was 11 billion Euros. Biotechnology is still a small subsector of the total health industry. However, the growth of medical biotechnology is, with a rate of approximately 5.4 % p. a., considerably faster than the rest of the industrial health industry (4.1 % p. a.). The industrial health industry includes production as well as distribution and whole sale.

The share of biotechnology in total gross added value clearly increased and about 66,400 employees create this value in medical biotech.

Sales of biopharmaceuticals amounted to 12.7 billion Euro in 2019 which accounts for a share of 28.7 % of the total German pharmaceutical market (source: BCG/VFA 2020).

Gross Value Added Medical Biotechnology Share in industrial health economy



Period of record: 2005–2019 (*prognosis); Source: Bundesministerium für Wirtschaft und Energie (BMWi); Gesundheitswirtschaftliche Gesamtrechnung (GGR), Ausgabe 2019; computation: WifOR

